Course Syllabus

Transformational Leadership, Strategy and Governance (Masters)

With Peter Merry

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Facilitator Information – Peter Merry

I am Ubiquity University's Chief Innovation Officer, and an instructor in Ubiquity University's Undergraduate School and the Wisdom School of Graduate Studies. I am Chair of the Center for Human Emergence (Netherlands)—and a founding partner of Engage! I've worked in and across different sectors. My experience includes facilitating integral change processes in multinational corporations, and government ministries, and in multistakeholder initiatives with global stakeholders. I have also spent many years in the not-for-profit and life-long learning sectors. I'm a recognized expert in the field of evolutionary systems dynamics. I have had my first book published in English and Dutch (Evolutionary Leadership). I'm an experienced designer of learning processes and host of collective inquiry and collaboration. I also have a background in theatre and folk music.

Having experienced the limits of more traditional approaches to societal change, my current focus is on researching the application of frontier science to whole systems transitions. As part of this, I am a Ph.D. student with Ubiquity's Wisdom School and have a diploma in systemic energy work with the Dutch-based Center for ECOtherapy.

I also teach in the undergraduate program.

Contact Me

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I will check and respond to the Discussion Forum and emails daily, between 0900-1700 CET

For emergencies, when you are not able to gain access to messages on the Online Learning System, please send a message to my course email address, as above. In the event a third party needs to contact me, please direct them to my contact information listed under "facilitator information." No third party should use your login credentials to gain access to the classroom.

Course Description

In today's rapidly changing world, learning to lead and design our organizations to ride the turbulence creatively is critical to our ability to make a positive impact. This course covers the subject of transformational change, and the implications for us as individual leaders, for our organizational cultures as well as structures. It combines intellectual rigor with personal challenge, collaboration with creative expression. Students engage with integrative maps of organizational and leadership development, as well as instantly applicable practices for becoming more effective and dynamic as individuals and collectives.

The main subjects covered include:

- Transformation and Change
- The Learning Organization
- Levels of Leadership Development
- Practices for Transformational Leadership
- Personal Effectiveness and Resilience
- Organizational Culture
- Tools for Collaboration
- Levels of Organizational Development
- Creating an Agile Organization
- Practices from the Future

The course is relevant for people already working in existing organizations, establishing their own organizations or preparing to enter the workplace. Having an organizational context to be able to refer to will greatly enhance the learning experience as you will be able to immediately link the concepts to your context.

Course Learning Outcomes

By the end of the course students should be able to:

- Express clearly the nature of transformation as compared to other types of change
- Reflect constructively on their own and others' leadership capacity
- Improve their transformational leadership capacity by taking concrete steps
- Analyze and describe an organization in terms of its level of development and agility
- Choose appropriate implementation tools for large-scale collaboration
- Design a strategy for enhancing the transformational quality of leadership and governance in an organization

Instructional Mode and Methods

This course is a combination of three major learning approaches:

1) Online learning with a wide array of materials and activities each week, including interaction with peers (videos, essays, journaling, quizzes, etc.),

2) Collaborative learning where you develop skills ranging from creative cooperation to critical thinking and engaged listening.

3) Self-reflection and self-mastery where you take the time to discover your qualities and potential.

Key Components of Online Learning at Ubiquity

The Online Learning aspect of this course has key components for you to work with:

• Video presentations by the key faculty. The average video is from 5 to 15 minutes long although in special instances, some may be longer.

• Quizzes: Many weeks will include one or more quizzes with multiple choice or simpler True-False options. These help you to integrate your learning, demonstrate understanding-level competence and allow the faculty to see how well you are relating to and understanding the material.

• Integration Tasks: These represent short tasks of 15 minutes or so to take in what has been presented. A question may be asked for journaling or for quiet reflection.

• Forum discussions are an important part of this course. Each week one or more questions will be presented for discussion, generally among the small cohort group to which you will be assigned.

• Journaling: Each person has a private journaling space that only they, and the faculty (the primary faculty and teaching assistant), have access to – unless the student chooses to share it with others. This is important for the student's self-reflection and regular journaling of even a sentence or two of reflection will contribute to the student's grade.

• Creative Assignments: You will have one major "creative assignment" to complete during the course of the semester. This is a collaborative project which you submit for assessment.

- Materials: Each week there will be some core required learning resources and a number of optional recommended resources. Your grade can be improved by demonstrating familiarity with optional resources in addition to those that are required.

- Extra Videos: In addition to the required videos for each week's learning, there will be additional videos for students that want to expand their inquiry in a particular area.

Your Mission / Change Project

For this master's level course, you are expected to have a project to work on and apply your learning to. The project should be related to an organization or collective endeavor that you are involved in (e.g. company, NGO, community project, group project, your start-up organization). For this course we would like you to define a mission project that involves aiming to achieve some kind of change within the seven weeks of the course. It should be related to issues of leadership, strategy and governance, and involve interaction with other people. You will be asked to share your mission with your peers and faculty at the start of the course. You may work on this project in a team in your organization or with other students on the course, as long as you clearly define your specific role in the team.

Course Modules & Topics

Module One: Introductions and Framing

This module introduces the course, its place in the context of society and introduces Integral Theory that we will return to throughout this course and which forms a core pillar of Ubiquity's approach. By the end of the module, you should be able to describe the course in its societal context and explain different dimensions of leadership through Wilber's basic Integral model.

- **Session 1:** Course overview and context in program
- **Session 2:** The challenge of the times
- **Integration task 1:** Journal – what drives you to play a leadership role?
- **Session 3:** An Integral Approach
- **Session 4:** Leadership Theories
- **Integration task 2:** Quiz – An Integral Approach to Leadership
- **Forum Conversation Question:** Why would an integral approach be relevant to leadership and governance?

Module Two: What is Transformation?

This module goes deeply into change itself - what we really mean by change, and what the different components and variations are. In particular, we focus on transformational change. By the end of the module, you should be able to explain transformational change and its relationship to other types of change.

- **Session 1:** Natural life-cycles
- **Session 2:** Organizational Life-cycles
- **Integration task 1:** Journal – reflect on where you and/or your organization are on the life-cycle
- **Session 3:** Types of Change
- **Session 4:** Emergence
- **Integration task 2:** KWL Table – list what you now know, what you still want to know and what you have just learned about transformation
- **Forum Conversation Question**: What kind of change is your society going through?

Module Three: The Learning Organization

This module reviews the core components of what it takes to be a successful learning organization. It draws heavily on the internationally-acclaimed work of Peter Senge from MIT. By the end of the module, you should be able to describe the main features of a successful learning organization.

- **Session 1:** Systems Thinking
- **Session 2:** Personal Mastery
- **Integration task 1:** Journal – what does "personal mastery" mean to you?
- **Session 3:** Mental Models
- **Session 4:** Shared Vision and Team Learning
- **Integration task 2:** Journal – how would you evaluate your organization through these five lenses?
- **Forum Conversation Question:** Share successes and blockages you have encountered in creating conditions for a learning organization.

Module Four: Leadership for Sustainability

This module explores what it means to play a leadership role explicitly committed to ecological and social sustainability. By the end of the module you should be able to describe what differentiates leadership for sustainability.

Note – this session developed by Dr Wayne Visser contains no video lectures so you are requested to review the articles and other videos listed below.

- **Session 1:** Definitions: What is sustainability leadership?
  - Visser & Courtice – *Sustainability Leadership*
- **Session 2:** Characteristics of sustainability leaders
  - Visser **–** *CSR Leadership*
- **Integration task 1:** Journal: Who would you regard as a good sustainability leader, and why?
- **Session 3:** Actions of sustainability leaders
  - Video **–** *4 CEO Perspectives on Sustainability*
  - *Unilever webpage on sustainability*
  - *A new paradigm for sustainable growth* – Paul Polman interview
  - *Unilever Sustainable Living Plan: Two Years On*
- **Session 4:** The paradox of sustainability leadership: cases of Monsanto & BP
  - Visser **–** *The Age of Responsibility*
  - *Monsanto webpage on sustainability*
  - *Monsanto's CEO Says Play Fair* (video)
  - *Monsanto CEO Hugh Grant: Our Critics Are Fueled By 'Elitism'* – news article
  - *Growth through Global Sustainability* – interview with Monsanto CEO
  - *BP's webpage on sustainability*
  - *Drowning in Oil* video
  - *BP's Bob Dudley on Earning Back Trust and Building a Sustainable BP for the Future*
- **Integration task 2:** Journal: Which sustainability leaders today are in danger of losing their credibility?
- **Forum Conversation Question:** Why is Paul Polman of Unilever regarded as an exemplary sustainability leader? What makes him different to other business leaders?

Module Five: The Transforming Leader

This module goes into detail on the characteristics and core practices of a leader who can transform themselves and the world around them. By the end of it, you should be able to explain the main characteristics of transformational leaders.

- **Session 1:** Measuring stages of leadership development
- **Session 2:** 3 stages and 15 competencies of transformational leaders
- **Integration task 1:** Quiz – leadership stages and competencies
- **Session 3:** Leadership for Emergence 1
- **Session 4:** Leadership for Emergence 2
- **Integration task 2:** Journal – which of the leadership qualities described do you feel most comfortable with?
- **Forum Conversation Question:** What kind of leadership is best suited to the world you see around you?
- **Self-Mastery:** Journal: For each of the leadership qualities described, assess your level of competency (Low/Med/High), looking for evidence for your assessment. Speak to the gap between the qualities described and your assessed level of competency. What is one step you can take toward developing one of these qualities in yourself?

Module Six: Being and Becoming

This powerful module introduces you to some concepts and practices that enable you to connect to your inner ability for clarity, compassion and creativity. These qualities are key to navigating complex times. By the end of the module, you should be able to describe your relationship at any given moment to your sense of calm and freedom.

- **Session 1:** The Ground of Being – Concept and Practice
- **Session 2:** 5 Tenets and 4 Qualities for Transformational Leadership
- **Integration task 1:** Journal – what recognition and tensions do these ideas and practices bring up in you?
- **Session 3:** Physical vitality
- **Session 4:** Energy and resilience
- **Integration task 2:** Journal – make a list of lifestyle changes you commit to making in order to increase your personal vitality and resilience
- **Forum Conversation Questions:** How do you see the 5 Tenets and their shadows play out in your everyday life? Share tips and challenges on supporting your personal vitality and resilience.
- **Self-Mastery Practice:** Contemplate the 5 Tenets every day for at least 15 minutes; Make the lifestyle changes you wrote in your journal and record how easy of difficult it was.

Creative Assignment

With 2-4 other students, invent a fantasy organization and create a promotional video for internal staff of max 4 minutes that demonstrates to them the potential of adopting more transformational leadership and governance. You will be learning more about this in the modules to come so you can develop it over the coming weeks.

Note: given this is a collaborative assignment, a survey will be sent to your other team members to give you feedback on your collaboration competency.

Module Seven: Personal Effectiveness

This module equips you with tips and tools to be highly effective and productive in your work. How to manage your inbox, how to stay motivated and aligned, how to really get the things done that matter. By the end of the module you should be able to relate personal effectiveness practices to your life and work.

- **Session 1:** Mapping personal effectiveness
- **Session 2:** Getting Things Done
- **Integration task 1:** Quiz – conditions for personal effectiveness
- **Session 3:** Zen to Done – Simple Productivity
- **Session 4:** David Byrd's Nine Keys to Sustainable Business Success
- **Integration task 2:** Journal – what will you change to boost your personal effectiveness?
- **Forum Conversation Question:** Share tips for increasing personal effectiveness.
- **Self-Mastery Practice:** Implement the changes you listed in your journal to boost your personal effectiveness and record a reflection on the process.

Module Eight: Creating a Transformational Culture

This module focuses on how to develop the cultural dimension of transformational organizations. By the end of it, you should be able to describe core qualities and practices for a transformational culture.

- **Session 1:** Understanding Organizational Culture
- **Session 2:** Vision, Mission and Values
- **Integration task 1:** Journal - MCreate or describe the vision, mission and values for your organization
- **Session 3:** The Invisible Dimensions of Culture
- **Session 4:** You and the other
- **Integration task 2:** Journal – describe a situation where changing your own attitude changed a relationship
- **Forum Conversation Question:** How do you see culture influencing change in your work context?

- **Self-Mastery Practice:** Identify a relationship you would like to improve with someone and by shifting your own perspective see if you can shift the relationship. Record the results.

Module Nine: Tools for Collaboration

This module introduces you to a number of approaches and tools for large-scale collaboration with groups. They are designed to bring out the highest possible potential in a group, using everyone's talents and insights. By the end of the module you should be able to select an appropriate method for large-scale collaboration.

- **Session 1:** Releasing Collaboration and Co-Creativity for Transformation
- **Session 2:** Open Space Technology
- **Integration task 1:** Write a 300 word opening introduction to an Open Space Technology session
- **Session 3:** Circle practice
- **Session 4:** World Cafe
- **Integration task 2:** Quiz – when to use which intervention?
- **Forum Conversation Question:** What have you experienced as the conditions needed for successful collaboration?

Module Ten: Levels of Organizational Development

This module explores the concept of levels in organizational development and in particular one example from Richard Barrett's Seven Levels of Organizational Consciousness. By the end of the module, you should be able to summarize the usefulness of mapping levels of development in organisations, and compare seven different levels of organizational awareness.

- **Session 1**: What are Levels of Organizational Development?
- **Session 2**: Mapping Levels of Development for Organizations
- **Integration task 1**: Quiz – Levels of Organizational Development
- **Session 3**: 7 Levels of Organizational Development – part one
- **Session 4**: 7 Levels of Organizational Development – part two
- **Integration task 2**: Journal – assess your organization through this lens of seven levels
- **Forum Conversation Question**: What makes sense to you in this module and what are your questions?

Module Eleven: Organizational Development by Natural Design

In this module we look at what the most natural ways would be to design an organization. Letting ourselves be inspired by how things happen naturally, we can create structures and processes that facilitate natural life processes rather than get in the way of them. By the end of this module, you should be able to relate the principles and practices of natural design to an organizational context.

- **Session 1**: Natural Design
- **Session 2**: Organizational Fitness
- **Integration task 1**: Quiz – organizational fitness
- **Session 3**: Chaordic Design – principles
- **Session 4**: Chaordic Design –practice
- **Integration task 1**: Journal – do a quick assessment of the fitness of your organization or community based on the concepts presented
- **Forum Conversation Question**: What pros and cons do you see in the natural design approach

Module Twelve: Creating Agile Governance

This module looks at how to create governance practices that enable you to hold a long-term vision while steering the organization dynamically day-to-day, and integrating all the relevant perspectives and information from your people. It is inspired by the holacracy practices. By the end of the module, you should be able to explain the core principles and practices of agile governance.

- **Session 1:** Principles of organizational agility
- **Session 2:** Designing for organizational agility
- **Integration task 1:** Journal – how agile would you say your current organization is? Why?
- **Session 3:** Practices for Dynamic Steering 1
- **Session 4:** Practices for Dynamic Steering 2
- **Integration task 2:** Quiz – dynamic steering
- **Forum Conversation Question:** What do you see as the benefits and pitfalls of adopting practices for an agile organization?
- **Self-Mastery Practice:** If you think of yourself as an organization, how agile would you say your current "organization" / organism is, and how do you currently make use of Dynamic Steering in your life and work? Journal your thoughts.

Module Thirteen: Frontiers of the Future

In this module we travel into the realm of possibilities that the very latest scientific research and leading-edge practices are pointing towards. Drawing on real-life experience of applying some of these approaches, this module opens our eyes to an incredible potential. By the end of the module, you should be able to summarize developments on the leading edge of large-scale energy work.

- **Session 1:** Energetic Architecture
- **Session 2:** Components of Energetic Fields

- **Integration task 1:** Quiz – energy fields
- **Session 3:** Systemic Energy Work
- **Session 4:** Co-creative Science
- **Integration task 2:** Journal – how are you relating to this material?
- **Forum Conversation Question:** What are the most leading-edge discoveries you are aware of that are relevant to leadership and governance?

Module Week Fourteen: Review and Challenge

This module revisits the main topics of the course and locates them in the context of a broader vision and societal trends. It also issues a challenge to you. By the end of the module, you should be able to explain how this course relates to the challenges in your contexts and broader societal developments.

- **Session 1&2:** Course summary - connecting the dots
- **Integration task 1:** Quiz – course highlights
- **Session 3:** The bigger perspective
- **Session 4:** The Challenge
- **Integration task 2:** Journal – what are the most important commitments you are making as a result of this course?
- **Forum Conversation Question:** What are the key insights you gained and what questions do you still hold?
- **Self-Mastery Practice:** Take the first step in implementing one of your commitments and record the results.

Mission and Self-Mastery Reports:

Note for students in Ubiquity academic programs

For students following academic programs for credit at the university, you are required to submit a Missions and a Self-Mastery report every trimester that describes how your experience relates to the courses you are studying and the self-mastery work that you are doing.

You may submit your report as writing, video or audio. Written submissions should be between 1000 and 1200 words. Video and Audio should be no longer than 5 minutes. All submissions must follow the Report Templates.

Every week you are also expected to write a short journal entry on your Self-Mastery experience.

General Course Materials

Core

Barrett, R (1998). *Liberating the Corporate Soul*. Woburn MA, USA, Butterworth-Heinemann

Beck, Don E., & Cowan, Christopher C. (1996). *Spiral Dynamics: Mastering values, leadership and change*. Cambridge, MA: Blackwell

Bolden, R et al (2003). *A Review of Leadership Theory and Competency Frameworks*. University of Exeter, Center for Leadership Studies

Brown, B (2011). *Conscious Leadership for Sustainability – a summary*. http://integralthinkers.com/wp-content/uploads/Brown_2011_Conscious-Leadership-for-Sustainability_Short-Excerpt1.pdf

Forman, J; Ross, L (2013). *Integral Leadership*. New York, Suny

Merry, P (2009). *Evolutionary Leadership*. Pacific Grove, Integral Publishers

Senge, P (2006). *The Fifth Discipline.* New York, Doubleday. Chapters 1-3.

Senge et al (2004). *Presence*. Cambridge USA, Society for Organizational Learning

Wilber, Ken (2000). *A theory of everything: An integral vision for business, politics, science, and spirituality.* Boston: Shambhala.

Recommended

Doppelt, Bob (2010). *Leading change toward sustainability: A change-management guide for business, government and civil society* (2nd ed.). Sheffield: Greenleaf.

Edwards, Mark G. (2009). *Organizational transformation for sustainability: An integral metatheory.* London: Routledge.

Kotter, John P. (1995). Leading change: Why transformation efforts fail. Harvard Business Review, 73(2), 59.

Taegel, W (2010). *The Sacred Council of Your Wild Heart*. Wimberley, 2nd Tier Publishing

Torbert, W. R., Cook-Greuter, S. R., Fisher, D., Foldy, E., Gauthier, A., Keeley, J., et al. (2004). *Action inquiry: The secret of timely and transformational leadership*. San Francisco: Berrett-Koehler.

Wheatley, MJ (1999). *Leadership and the New Science*. San Francisco, Berrett-Koehler

Wilber, Ken, Patten, Terry, Leonard, Adam, & Morelli, Marco (2008). *Integral life practice.* Boston: Integral Books.

Assessment and Grading

The final course grade will be calculated as follows:

> 1. Weekly multiple-choice quizzes. These are to help you integrate the learning and enable you to demonstrate a competence in understanding the topic covered each week. Success unlocks a competence badge! (These will count for 20% of your grade)

> 2. Journal entries and discussions for each week that both summarize and reflect on the subject matter of the week, as specified per module. (This will count for 20% of your grade)

> 3. One Creative Assignment during the course of the semester. These will be reviewed and graded by Course Facilitators. (This will count for 60% of your grade).

Student work will be evaluated for the following areas (note: *Students pursuing an A grade should do more than the minimum requirements; that is, do additional reading and view extra films as recommended in the course Schedule).*

> 1. Achieving the primary *objectives* of the course;

> 2. *General knowledge* of all required reading assignments and of all material presented by the instructor in lectures and from class discussions, films, and so on;

> 3. Clear, concise, reflective, critical *thinking*; and

> 4. Regular, active, and meaningful *participation* in class discussions of assigned readings in class and on the course website.

Grading Formula

Points	Grade
95+	A
90-94	A-
87-89	B+
84-86	B
80-83	B-
77-79	C+
74-76	C
70-73	C-
67-69	D+
64-66	D
60-63	D-
<59	F

ASSIGNMENTS		Points
Quizzes	All Weeks	20 points
Creative Assignment #1	Modules 7-14	60 points
Journal entries and Forum Discussions	All Weeks	20 points
Total		100